

**COBHAM****CLIENT BACKGROUND**

Cobham Mission Systems, the world's leading supplier of critical control solutions, helps customers increase the safety and mission capabilities of personnel and equipment in extreme environments. They provide proven and trusted solutions that include air-to-air refueling, fuel-tank inerting, life support, space propulsion, weapons carriage, and missile actuation and enable customers to achieve mission success. CMS is a strong and growing company dedicated to the development, delivery, and support of leading-edge aerospace and defense technology and systems.

**CHALLENGE**

Cobham Mission Systems (CMS), which operates in several global locations, is experiencing rapid growth. With legacy systems lacking an enterprise and customer 360 perspective, CMS needed a modern customer-relationship-management (CRM) platform that would scale with their growing business. With disparate legacy systems, they wanted a solution that would bring sales visibility and reporting consistency across their entire organization. The COVID-19 pandemic added urgency to this project as the entire sales team was working remotely.

The CMS sales cycle is multi-year and complex, with inside and outside sales teams operating globally. The company wanted to achieve "one source of truth" for sales management, opportunity tracking, customer engagement, and forecasting. Because their historical customer and sales data was stored in several enterprise resource planning (ERP) systems, two separate instances of Microsoft Dynamics, and various data files, creating a company-wide sales pipeline and forecast was an arduous process. Another challenge of this project was the tight timeline: the company wanted to roll out Salesforce to its global team in less than two months.

CMS selected Spinnaker Support as the best implementation partner based on its aggressive agile approach and timeline, experienced team, and combined service offering of implementation and long-term support. The project included the standardization of sales processes across business units and geographies to facilitate consolidated pipeline tracking, executive reporting, and sales, inventory and operations planning processes (SIOP).

**APPROACH**

The CMS Salesforce project owners understood the importance of executive buy-in and user adoption to achieve a great ROI. To initiate their internal needs analysis process, the CMS team performed a requirements project in early 2020 to capture and document existing and future objectives. Throughout this exercise, CMS focused on the standardization and automation of critical business processes across the sales organization.

**SERVICES PROVIDED**

- Implementation Services – Salesforce
- Managed Services – Salesforce

**INDUSTRY & ACCOUNT DETAIL**

- Industry: Defense & Space
- Employee Count: 2,000+
- Primary Manufacturing Sites: Wimborne, Dorset, UK; Orchard Park, NY, US; Davenport, IA, US
- Corporate Structure: Privately held

**ENVIRONMENT**

- Phasing out siloed Microsoft Dynamics
- Migration to strategic enterprise platform: Salesforce Sales Cloud
- No in-house Salesforce expertise

**FOR MORE INFORMATION**

Our case studies give an inside look at the experiences of other companies that have used Spinnaker Support for their SAP & Oracle software support needs. Visit <https://spinnakersupport.com/client-success-stories/> to read other client case studies.



When the Sales Cloud implementation project began in late 2020, Spinnaker Support and CMS conducted discovery sessions to validate and prioritize the deliverables on the project “wish list” that resulted from the earlier internal analysis project. This process included interactive sessions with key users and stakeholders to verify needs and workflows. The discovery phase identified the essential requirements for the deployment of Sales Cloud.

Spinnaker Support and CMS established a six-week project timeline to deliver the refined minimum viable product (MVP). This aggressive global rollout required rapid stakeholder alignment, highly engaged business change champions, and a skilled and integrated team.

*“An amazing amount of experience came together to make it a very easy discovery period,” said Dione Fultz, Business Development & Strategy Operations Lead at CMS.*

To meet the short timeframe required to complete the project, Spinnaker Support used an agile software development methodology. The team used project management and ticketing software to manage the sprints and track progress to coordinate the agile framework. The Spinnaker Support team conducted two build sprints, delivered remote global training to change champions and end users, and deployed the finalized solution.

## SOLUTION

The CMS solution included:

- A single view of enterprise accounts and contacts, sourced across multiple ERP systems
- “One source of truth” for reporting and dashboarding on global pipeline
- Standardized global sales processes
- Product delivery and revenue schedule creation automation
- Multiple currency functionality
- SIOP reporting automation
- Retirement of legacy CRM systems

“I was stunned by the amount of work that Spinnaker Support was able to do in a short amount of time. It was seamless.”

Dione Fultz,  
Cobham Missions Systems

The implementation project included an intensive data migration exercise from existing CMS databases, which was integral to obtaining “one source of truth” for customer and prospect data. The Spinnaker Support team loaded data into Salesforce originating from three different ERP systems, Microsoft Dynamics, and various data files. CMS placed a high priority on data cleansing; this proved to be an important step for the successful implementation of Sales Cloud as the company needed one location for sales and customer data.

The final phase of the implementation project was training. Due to the pandemic and remote working status of most employees, the Spinnaker Support team trained all CMS users via webinars, topical videos, and one-on-one sessions. They continue to use video trainings for future hires to ensure quick adoption and onboarding.

## RESULTS

The main goals of the Sales Cloud implementation project were to build a new CRM platform that would scale with CMS's growing business and create a foundation for a customer 360° view.

### Key outcomes of the implementation project:

- A single data source to analyze global sales activities across the entire company
- New strategic business conversations that were not previously possible
- Clarity of the origination of future revenue, by channel
- Reduction of over 60 hours per month needed to create and manage pipeline reporting
- Lead tracking for multi-year deal cycles up to five years

### Day-to-day process improvements:

- Real-time sales metrics (previously was monthly)
- Standardization of sales vernacular and processes
- Consistent use of data fields to create reliable pipeline reports
- Increased data hygiene and forecasting accuracy
- Consolidation of historical customer data

*"The Spinnaker Support team did an excellent job, were easy to work with, and hit the timeframe goal," said Fultz. "We all came together on this project and are grateful for the teamwork. The business has definitely benefited from this project."*

## THE NEXT STEP: CONTINUOUS SALESFORCE IMPROVEMENT THROUGH MANAGED SERVICES

Prior to the initial launch of their Sales Cloud environment, CMS realized that, with no in-house Salesforce expertise, they would need assistance if they wanted to continuously improve their Salesforce ROI. They decided to enlist Spinnaker Support's managed services team for ongoing Salesforce development and management. "The way Spinnaker Support delivered on the initial project, we had no concerns about doing more work together. Even if we were tied to a tight deadline, I knew we would be able to make it," said Fultz.

Spinnaker Support's rigorous approach to ongoing Salesforce service provides businesses and organizations with a trusted partner that can build and improve a high-functioning Salesforce environment. CMS has continued its post-implementation relationship with Spinnaker Support to accomplish two goals: 1) to continuously deliver innovative features that move the business forward and 2) to support the initial Sales Cloud build.

Every month, the Spinnaker Support team works with CMS to understand what stakeholders need from Salesforce for continuous improvement. The team then defines the solution architecture, reviews the proposed approach with CMS, and confirms release timing. A few weeks later Spinnaker Support releases the planned features and enhancements, creating a best-in-class monthly update process.

This proactive approach to long-term support moves the business forward and allows CMS to rapidly adapt to changing business needs and requirements in the aerospace and defense industry. "Because of the success we've experienced with Spinnaker Support, we are looking to move faster with adding new functionality. We have a lot of confidence in achieving our Salesforce goals because of our great relationship with Spinnaker Support," said Fultz.

*"We've only scratched the surface of what we can do with Salesforce. Having Spinnaker Support as our partner is vital so we can add the right functionality long term."*

Dione Fultz,  
Cobham Missions Systems

## ABOUT US

Spinnaker Support is the leading global provider of Oracle and SAP third-party support and managed services for mid-size to Fortune 100 global enterprises. Our customers benefit from more responsive, comprehensive, and affordable support services that ensure the smooth, secure, and compliant operation of their enterprise applications and technologies.

Whether you need immediate help for high-priority issue resolution or ongoing monitoring and maintenance, we have you covered. Our exacting standards and unparalleled expertise have earned us the trust and loyalty of more than 1,100 organizations in 104 countries.

